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ABSTRACT

Designed for use by public participation coordinators in natural resources planning, this manual provides information to aid in the development of a coordinated planning strategy by defining reasonable program goals and following through by selecting appropriate means and methods. In a discussion of the orientation stages of public involvement (PI) planning the following topics are covered: gathering information about the project, the public, and the agency; determining expectations and implications for public involvement; and developing the coordinator's role. Covered next are such aspects as laying the groundwork for PI as rallying agency support for the PI program, dealing with different expectations, relating PI to project planning, studying methods and techniques, evaluating techniques, preparing discussion materials, and collaborating and negotiating. Focus of the section on program implementation is on the design process, detailed preparation, and evaluation. Concluding the manual is a brief list of references. (MN)

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MAKING YOUR WAY THROUGH MURKY WATERS

A MANUAL FOR PUBLIC PARTICIPATION COORDINATORS

IN NATURAL RESOURCES PLANNING

by Janis Franklin
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August, 1981

North Carolina State University

Raleigh, North Carolina

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Note to the Public Involvement Coordinator

Congratulations on having undertaken a challenging and worthwhile job in what is in many ways a pioneer field.

This manual has been designed to help you develop a coordinated planning strategy by defining appropriate program goals and following through by selecting the means and methods most likely to achieve those specified ends.

The purpose of all this is to ensure that the shape of your Public Involvement (PI) program is determined more by conscious design than by chance or crisis. Strategic planning can also help you to identify and reduce the conflicting goals of the various publics and agency staff. Finally, careful planning can help to resolve the ambiguities inherent in your own role as PI coordinator, as you relate to the agency and the public.

Unfortunately there are no sure-fire recipes for success in this or any other business. However, the systematic process described here can clarify many elements of your job if you are willing and able both to take the initiative and to communicate effectively.

The worksheets may look rather time consuming, but they (or some modified versions which better suit your situation) should be helpful in organizing your thinking, maintaining a program record, and stimulating focused discussion with others.

To develop a fuller understanding of the concepts incorporated in the manual refer to additional reference material such as the books listed at the back of the manual.

STAGE 1: ORIENTATION

Information-gathering

Determining expectations and implications for PI

Developing the coordinator's role

The General Purpose: **To acquire an understanding of the elements which should be considered in planning the PI program.**

During this orientation period you need to accomplish four things:

To obtain as much information as possible about the project, the publics, and the agency;

To establish contacts and initiate the relationships necessary for collaborative work throughout the project life;

To set up the mechanics of communications--mail handling, telephones, etc.; and

To develop your role as public involvement coordinator.

INFORMATION-GATHERING

As you go into your new job you will be concerned with making a good impression in a new environment, eager to learn, anxious to get started, and overwhelmed by the amount of information from many sources. At this stage you will have a unique opportunity to ask questions without being expected to have the answers. In fact a newcomer who claims to have all the answers is an object of immediate and longlasting distrust!

Frequently the new coordinator discovers that the goals, importance and structure of the PI program are only vaguely defined. A major part of your job may be to develop the program virtually from scratch and, to a large degree, define your own position and its relation to other positions in the hierarchy.

You can put this grace period to best use if you purposefully structure and record your information gathering for future reference.

Information gathering takes many forms: reading agency reports and memoranda, browsing through newspaper clip files, interviewing department heads, and even listening to coffee break scuttlebutt. However, since you are designing a public involvement program, not writing a novel, you need to organize the facts and subjective impressions you acquire during this information-gathering process in a way that will help you define and accomplish your goals.

FINDING OUT WHERE THE BODIES ARE BURIED

First, you must assess the situation so that you will begin to develop a realistic working understanding of the major factors which will affect the PI program. It is crucial that you know the people and groups who are involved, their special interests, and how they relate, or fail to relate, to one another.

The three elements which most need definition and careful consideration are:

the project

the public(s)

the agency

As coordinator you will need to establish effective working relationships with each of these elements. You must decide what characteristics of each should be taken into account in shaping the PI program.

For each element (project, publics, agency) you will find suggested worksheet formats. The worksheets simply provide an organized way to record the basic descriptive **facts** and the subjective **impressions** of each element for your use in program planning.

Only you can determine just what items are most relevant for your situation. As you go along you'll discover new sources and additional considerations which should be included.

Try to use as many sources, especially for subjective data, as possible. Different sources may prove to be very dependable, totally unreliable, or somewhere in between. It is important that you withhold judgement until you are sure of your ground.

Begin early to make tentative notes on the **implications** of information for the PI program. However, as you make notes, take care to maintain an objective tone. First, you may change your mind, and second, your files are quite likely part of the public record. After talking with Joe X you may be sure that he has no idea what he is talking about and has less intelligence than your dog. Try to record his opinions objectively and attribute them to the source. Commit your more colorful comments to memory rather than to paper.

THE PROJECT

Information about **the project** constitutes one of the basic elements in your planning efforts. You need to understand both the technical and political aspects of the project as thoroughly as possible. Orientation Worksheet I on the opposite page suggests some of the questions to which you need answers.

The details of sewage, housing codes, floodplain management may not suit your tastes, but people will expect you to translate the technical jargon of the experts into English. Read some background material and ask the technical staff to explain points you don't understand. On your worksheet (I) write down some initial definitions and basic concepts before you become so familiar with the subject that you forget that most people do not know an aquifer from a conifer.

You can and should lean heavily on the staff for technical information, but you need to find the answers to some questions yourself. How did the project come about, and why? What is the scope of its potential impact? Is it short term, affecting only the local community, or is it likely to go on for years and be influenced by state or federal-level policy changes? What are the official aspects of its mandate? What are the formal requirements and limits for the PI program?

Most important for your work is the way various possible outcomes might affect the publics. Will drinking water, agriculture, commercial development, and/or recreation be involved? What are the long-term and short-term economic factors?

As you record this information you will undoubtedly think of other questions about the project. Your notes will be a handy reference in the months ahead.

THE PUBLIC(S)

Who make up the relevant **publics** and what is their experience with government, planning, politics and civic matters in general? How are public interest decisions usually made in the project area?

Orientation Worksheet II offers a list of some of the questions you will need to answer about the second basic element of your PI program--the public(s) involved. Again, as you gather information you will probably expand the list of publics and the list of questions.

You particularly need to determine public attitudes toward this project and the agency or agencies involved in the project. If there have been similar projects in the area in the past, find out what happened, good and bad, and who the actors were.

Is the public with which you'll be working as specific and homogeneous as the **dairy farmers pasturing cattle in County X** or as diffuse as **the political, industrial, agricultural, recreational, developmental and conservationist interests related to a multi-state river basin?**

ORIENTATION WORKSHEET 1: PROJECT DESCRIPTION

Purpose: to become familiar with the project and understand its relationship to the PI Program

PROJECT: (sample questions)	PI PROGRAM
CONTEXT: -How did the project originate? -Purpose? -Sponsor? -Agencies involved? -Related to other projects? -Etc.	-Formal requirements for PI? -Unwritten expectations for PI?
GIVENS: -Time-frame? -Specified planning phases? -What decisions must be made? By whom? -Etc.	-Other effects on PI?
POTENTIAL: -What are intended outcomes? Products? -What are the possible outcomes? -What outcomes do project staff wish to avoid? -Etc.	

ORIENTATION WORKSHEET 2: PUBLICS

Purpose: to learn about the various publics and their potential effects on PI

PROJECT AREA (sample questions)	LIKELY EFFECTS/ IMPLICATIONS FOR PI PROGRAM?
-governmental units included? -demography? -local decision-making processes? -economy? -major sources of income, such as agriculture, industries, etc.? -etc.	
GROUPS INTERESTED IN OR AFFECTED BY PROJECT: (List) (For EACH, set up descriptive sheet) (Sample questions:) -formal organization? -internal structure? -interest in project? -preferred outcomes? -previous experience with PI? -attitude toward PI? -expectations of PI? -attitude toward government? -influence in public affairs? -composition of group? -group leaders? -characteristics of group leadership? -access to resources (e.g. facilities, communication channels) -etc.	

Are these people highly sophisticated or inexperienced at participatory planning? Are they powerful or underprivileged, both or neither? What organizations of special interest groups exist? Are there individuals or industries that have a particular interest in the project?

In summary, you need to find out as much as you can about the people who live, work, have interests in, or will be affected by decisions made in the project area.

THE AGENCY

What is the nature of **the agency**? The frustration which results from working within a large organization, public or private, often is due to a failure to understand how the organization works, or coming to that understanding too late. Try to learn as much as you can about the agency before you start to organize your program. You will then be better able

to use the resources available within the agency,

to avoid or at least cope with many stumbling blocks and a lot of red tape, and

to accomplish more productive work.

The worksheet on the next page (Agency Description) identifies at least some of the information you will need to gather. Note that your position is listed as one of the key perspectives on the PI program. Don't neglect to take stock of your own expectations and skills.

What are the formal responsibilities of this agency? How are its programs funded? What political pressures influence its operation? How does it relate to other agencies and the public? How do the bureaucratic networks within the agency function?

More specifically, what are the priorities, attitudes, power structure, and working patterns of the staff assigned to this particular project?

Finally, and perhaps most important as far as your work is concerned, are there **agency-wide rules or expectations regarding PI?** What has been the project staff's experience with PI, and what attitudes or assumptions do they now hold about it?

Although this description of information-gathering may look formidable, you need specific information so that your program plans will fit the realities of project requirements and the character of publics and agency. For example, PI methods which might be very effective in a three-block, inner-city, urban renewal project can't be expected to work well, technically or politically, in developing regional standards for agricultural groundwater contamination.

ORIENTATION WORKSHEET 3: AGENCY DESCRIPTION

Purpose: to become familiar with the agency and understand its relationship to the PI program.

AGENCY

What's its overall mission?
What are its functions, activities?
Organization chart, internal and external?
What's the relation of the project to other activities?
Attitudes, expectations re: The project?

PUBLIC INVOLVEMENT

Has the agency a formal description of PI function, beyond coordinator's job description?

For each person in the positions listed below, what is their:	Expectation of PI program?	Expectation of coordinator?	Attitude toward PI?	Experience with PI?	Skills relevant to PI?
Chief Administrator					
Planning Staff					
Technical Specialists					
Other					
PI Coordinator					

PR or PI--Is there a difference?

You are an employee and therefore a representative of the agency or organization who pays your salary. However, you are not a public relations specialist, whose primary function is to sell your agency and its programs to the public.

The difference between "public relations" and "public involvement" may come as a surprise to many people you encounter, even to the agency head who hired you. If this is the case you will need all your skills as a diplomat to protect the integrity of your role and still preserve a cordial working relationship with your agency colleagues.

As a public involvement coordinator your function is to facilitate communication and productive exchange between various groups which may be vastly dissimilar in organization, goals, and membership. Your job therefore puts you in a boundary or linkage position, requiring you to work independently, while maintaining communication with a large number of people.

Objectivity is therefore critical. You cannot be, or be perceived as, the agent or advocate of any one group, even your own agency.

Taking Advantage of the Bureaucrary

Being part of a large agency can have its advantages. Are resources, such as AV equipment, word processing systems, publication assistance, and computerization of mailing lists available? If so, how do you obtain access to them? That is, are there specific procedures to follow, specific people (such as graphic artists) whose acquaintance and good will you should cultivate?

If other sections in the agency have public involvement programs you may benefit from their experience. This is particularly important in establishing contacts with conservation, civic and educational organizations which may be invaluable to your efforts. Other people in public involvement roles can also give you professional and emotional support which can be invaluable in maintaining your sanity when things get rough.

DETERMINING EXPECTATIONS AND IMPLICATIONS FOR PUBLIC INVOLVEMENT

This research also gives you a purpose for becoming acquainted with the people with whom you will be working. Beyond the bare facts, you need to learn as much as you can about their goals for the project (their preferences for its outcome) and their expectations about the PI program. **Notice and maintain the distinction between project and PI program goals and expectations.**

That distinction is important because differences of opinion about project outcomes will inevitably surface during PI program activities. The PI program itself can become a secondary level of potential confusion, especially if participants have different assumptions about how the PI program should function and what their roles should be. Therefore make every effort, as early as possible, to draw out and begin to clarify the differing goals and expectations of both agency staff and the various involved publics. Then plan the PI program to facilitate the resolution of these differences. If you try to avoid these issues the PI program is likely to become a circus of confusion, and perhaps break down entirely.

DIFFERENCES IN PROJECT GOALS

Differences in project goals are to be expected in any sort of planning. Because natural, human and financial resources are limited, not everyone's preferred ends can be fully served. For example, water diverted upstream may mean less for downstream users. The new road which provides for one man's business expansion may at the same time destroy another man's orchard. The agency which budgets a great deal of planners' time to PI may do so at some expense to technical quality.

Such differences in viewing the project result in the formation of **special interest groups**, which then engage in some form of political activity to try to affect the outcomes. (**Special interest** is not a negative term. Unless people have a rational stake in project outcomes, they will not be motivated to spend their time and energy in participation. In natural resources planning the major opposing viewpoints often can be generally grouped as **developmental** and **conservationist**, neither of which is intrinsically good or evil.)

The point for the PI program is that, without encouraging any premature, hard-line positions, you need to use your initial information-gathering contacts to gain insight into people's project preferences as they presently exist.

DIFFERENCES IN EXPECTATIONS FOR PI PROGRAM

Picture the confusion of the following public meeting: The citizens assume they have been convened to **decide** an issue. The PI coordinator is hoping to elicit **information** which will be considered by the

decision makers. At least some of the agency staff view the meeting only as a means of obtaining an expression of **support** for their proposals. Everyone goes home angry except the press, who have quite a story.

If you intend to establish and maintain credibility for both the PI program and the entire project you need to gather subjective information concerning people's expectations of the PI program. What do they see as their purpose? What roles and power do they assume or prefer for agency, public, and coordinator?

Incompatible assumptions are as likely to exist within the agency itself as among the various publics. Some staff may be so optimistic that they think that a brief public meeting will be adequate to resolve all dilemmas and yield consensus, while others may hold such a negative view of PI that their only expectation is one of wasted time. Disillusioning the former is easy, but persuading the latter of the value of PI will only be successful if and when you can produce some tangible results.

DEVELOPING THE COORDINATOR'S ROLE

You have been told to orient yourself to the three basic elements of your job by acquiring reams of information, all as soon as possible, about the project, the publics, and the agency. This is not an easy task, but if you try to make each contact serve as many purposes as is feasible, and record and file the results in a structured format such as the worksheets provided, these first weeks will go much smoother.

For example, when you identify particular individuals or persons who seem to speak for organizations or special interest groups, you should record these contacts. The sample contact file shown is one way to do this.

As you make your contacts you need to be tactful as well as energetic. Searching out existing attitudes should be handled sensitively so that people will not become locked into positions. Eventually, the PI program will provide opportunity for dialogue and modification, but this is a time for learning only. You need to find out the lay of the land before you try to move the earth!

Many people will respond frankly to straightforward questions after you have established some rapport and explained your purpose. Of course there will be some attitudes that people prefer not to declare, or of which they are not consciously aware. You may have to listen for things they don't say and do some intuitive guesswork.

An example is an agency director whose real goal for the PI program is to comply with federal regulations as inexpensively as possible. Officially, he would be likely to express something on the order of **provision of opportunity for all citizens to participate fully in planning.** If such an ambitious statement carries an incompatibly tiny budget, you need to note the discrepancy and do what you can to resolve it, or else live with it. You may find yourself humming "The Impossible Dream" a lot.

Dealing with the Agency

First, familiarize yourself thoroughly with the project so that you are well grounded in the basic context of staff activity. After you have talked with individual agency staff members and, as may be the case, other people associated with the project staff, an agency staff meeting committed to exploration of each person's expectations for the PI program may be useful.

Since staff meetings can be the bane of bureaucracy, avoid initiating one until you have a definite plan for accomplishing your goals within the context of a group discussion. The chief administrator can greatly enhance the usefulness of the meeting by encouraging open discussion and by not declaring his position at the outset.

Also use the meeting to explain (and gain support for) your next step: spending time in familiarizing yourself with the project area publics. Remember to avoid pinning people into rigid positions which will be hard to change when you provide them with feedback from the public. Fill in your agency worksheet, for your own reference, but again, remember to avoid pinning yourself into rigid conclusions as you record your impressions. Try to view the opinions you encounter as a starting point rather than a limitation and be careful not to overweigh those opinions which concur with your own. It is easy to hear what you want to hear.

Meeting the Publics

Maintain the open attitude during your next step. Now that you understand the project and have a sense of the sponsoring agency position, you are ready to get acquainted at several levels with the publics. What you are looking for as you talk with different people are groupings of interests in relation to the project. You will begin to discern the various aggregations of individuals--public officials, farmers, waterfront landowners, etc.--who share particular orientations toward the project. Good record keeping is an invaluable part of this process.

As you establish contacts with the public, you will set the tone for the entire PI program. Therefore, be tactful. Don't evaluate people's opinions, at least not audibly. Restrict your education efforts to clearing up misunderstandings of facts about the project and to answering questions and requests for information.

Building relationships with the publics will be facilitated by your genuine interest in their concerns, by your accessibility, and by your honesty. From the very beginning, do your homework, but if you're asked a question you can't answer, admit you don't know, offer to obtain the information, and then DO IT!

The Contact File

Begin and maintain a contact file like the example given as Worksheet 4, including not only who and where but **why** the person might participate. Is the individual, for example, a representative member of a group likely to be affected by project outcomes?

Also note potential resources such as skills, access to media and other communications networks, and meeting facilities. Be especially alert for those people whose aptitudes, representative qualities and respect in their segments of the local community are such that they can, in effect, speak for groups of stakeholders.

The people listed in your contact file will probably be included on your mailing list. As you record new information about your active contacts, don't forget to correct your mailing list as needed. Also, be sure to **date** everything and to resolve discrepancies in names, addresses and telephone numbers as soon as you can. Computers are great for this kind of housekeeping, but you will have to format your information to suit the computer. Therefore, put your agency computer specialists high on your list of people to get to know.

During this orientation period you will first gather information about the project, the agency, and the publics. You will then initiate contacts with whom you will be working throughout the project and perhaps beyond. In this process you will identify differences in expectations about the project and about the PI program. Finally, you will establish your own identity as coordinator between the agency and the publics.

As the project continues you will often be under pressure from both agency personnel and members of the public to represent or promote their special interests or pet projects. However if you know what you think, and why, you can explain your decisions as you develop, implement, and modify the PI program. The worksheets and evaluation procedures described here will both help you develop your rationale and explain it to others.

If you are successful during this initial period of orientation, the results of your efforts will be that agency personnel will have confidence that you can find out how their proposals are likely to be received by various publics and that you can obtain inputs from the publics which will aid in the successful completion of the project. At the same time members of the public will begin to perceive that you can and will give them straight answers to their questions and that you will ensure that their concerns are heard and seriously considered.

Answer the Phone, Somebody, Please

Now that you have established contacts, telephone inquiries must be handled courteously and mail should be routed to you immediately. If you are semi-buried in a large agency or multi-agency department with several offices which have similar-sounding names or lots of acronyms, or if you

ORIENTATION WORKSHEET 4: CONTACT FILE (sample)*

Purpose: maintain a resource file of individuals

NAME _____

ADDRESS _____

TELEPHONE _____

ORGANIZATION/GROUP _____

NOTES: (Characteristics, access to resources, dates and outcomes of contacts, etc.) _____

*This may be kept on 5 x 8 cards, with references to your program log, if needed.

are part of a very small, short-handed organization, internal communications may be a problem.

In a large organization the most straightforward solution is to introduce yourself to the switchboard operators, mailhandlers, and secretaries around the place. Give them a card with your name, office, telephone extension, Post Office number, if it differs from theirs, and a list of the types of inquiries which should be directed to you. You may end up as a catchall for calls and letters which stump the clerical staff, but by this time you should be able to compile your own referral list for people who are routed to you in error. Help fight to eradicate the "bureaucratic runaround" by finding out what goes on outside your little cubicle!!

In a small office the problem may be that there are times when nobody is around to answer the phone. Employ an answering service or get one of those telephone recording devices. However, if you do this be sure to respond to your messages promptly!

If the internal communication system is hopelessly slow or if you expect to handle large volumes of incoming letters and calls, try to get a special Post Office box and/or phone line for the public involvement program. Also, investigate the possibility of justifying an incoming WATS line (Wide Area Telephone Service), which will allow out of town callers to contact you without paying long distance rates.

REVIEW AND REVISION

When you have gathered enough information to describe and characterize the project, agency, and publics, you need to organize your data and assess the situation in preparation for Stage 2.

Review and revise your assessments of each element.

Update your documentation, including your contact file.

Decide on a method for maintaining a program log which will work for you. (You need some means of recording activity as it happens so you can learn from it and keep others informed.

You will probably find that you have accumulated a bewildering array of opinions and perceptions about the nature and goals of both the project and the PI program. Now you must take this material and mold from it a coherent program.

STAGE 2: LAYING THE GROUNDWORK

Rallying Agency support for the PI Program

Dealing with differing expectations

Relating public involvement to project planning

Studying methods and techniques

Preparing discussion materials

Collaborating and negotiating

The General Purpose: Gaining agency approval for the basic structure and major activities of the PI program.

During your orientation period you played the role to some extent of the human sponge, absorbing as much information from all sources as possible. In this stage you must be more assertive, as you begin the basic planning for the PI program. This planning will call for a good deal of analytical thinking on your part as you evaluate the data you have collected, and good communication skills as you involve others in the design of the PI program. If you neglect either you're in deep trouble.

A major goal at this point is to gain agency support for the PI program as an integral part of the total planning project. This support should include recognition of the need for two major dimensions. One dimension is that of building and maintaining on-going communication with the publics, e.g. with individuals, groups, organizations, and news media. This will include outgoing efforts like public relations and information dissemination; it also includes routine efforts to gather information from the public and informal opportunities for discussion between publics and planners.

The second dimension is the more visible one of holding formal events, such as public meetings or workshops, at which planners and publics exchange information around a structured topic.

RALLYING AGENCY SUPPORT FOR PUBLIC INVOLVEMENT

Schedule a meeting with the agency staff. The purpose of this session will be to gain agency approval of a general structure of the PI program.

To be successful, this session will require lots of homework on your part. You must present the staff members with a concise description of current perceptions and expectations regarding the project and the PI program. You must also demonstrate how the PI program fits in with the planning project as a whole and the pros and cons of various strategies.

The achievement of full-partnership status for the PI program will be a continuing process, but at this first meeting you can describe how the PI function can be useful to the agency's work. You can show, by your knowledge and behavior, that you have the special skills for conducting an effective program and therefore represent another area of specialized expertise.

Put the date on your calendar and get to work.

DEALING WITH DIFFERING EXPECTATIONS

First, lay out the **baseline data** you have gathered about people's expectations. Your earlier surveys of agency and public perceptions (which you recorded on your worksheets) will have revealed differences which should be compared carefully. If they are ignored or glossed over now they will only crop up later in the program, to everyone's frustration and to the detriment of the program.

Groundwork Worksheet 1--Comparisons

To help you and others make objective comparisons of differing expectations, set up a worksheet like the one on the opposite page which will present any discrepancies clearly. Prepare some notes for discussion of compromises and possible resolutions. Then polish up the comparisons worksheet for use at the agency feedback session.

RELATING PUBLIC INVOLVEMENT TO PROJECT PLANNING

The relationship between project planning and PI program planning can be a basis for communication between you and other agency members. Formal planning procedures provide the framework for both. Agency staff should readily understand phrases such as "time sequences" and "expected costs and benefits". Because you're speaking their language, the planners can contribute greatly to the quality of the program.

**A word of warning: While you can and should know the language of planning, be careful not to let yourself use the jargon and catchwords of any field as a substitute for careful thought and clear language.

Groundwork Worksheet 2--Basic PI Program Planner

A planning format for designing and presenting your program rationale is shown on page 24. The major headings at the top are those of a generalized all-purpose one-size-fits-all (or nobody?) planning process. If they do not adequately fit the sequence for your overall project, revise them. By starting with the established planning project phases, you ensure that the PI program is related to them at every step of the way. Try to find out (tactfully, of course) whether these sequences are likely to be changed in the course of the project, and if so, how drastically, so that you can build the necessary flexibility into the PI program.

GROUNDWORK WORKSHEET 1: COMPARISONS

Purpose: To examine discrepancies in goals, expectations, preferences.

	AGENCY	PUBLICS
Preferred Project Outcomes?		
Comparison Notes		
Expectations for PI Program?		
Comparison Notes		
Other Differences?		
What Resolutions Might Be Made?		

GROUNDWORK WORKSHEET 2: BASIC PI PROGRAM PLANNER

Purpose: To define what will be happening in the PI program, and why, at each stage of the planning project.

PLANNING PROCESS SEQUENCE DATES	PROBLEM IDENTIFICATION ( )to( )	GOAL DETERMINATION ( )to( )	ISOLATE ALTERNATIVES ( )to( )	EVALUATE ALTERNATIVES ( )to( )	SELECT ALTERNATIVES ( )to( )
ROLES OF PUBLIC					
ROLES OF AGENCY					
PI PROGRAM OBJECTIVES					
ONGOING COMMUNICATIONS Activities					
Expected costs (resource needs)					
Expected benefits					
Rationale					
EVENTS Activities					
Expected costs (resource needs)					
Expected benefits					
Rationale					

As you study the project phases you will determine the respective roles of agency and public at each stage. These variations in roles depend upon the nature of the task to be done at each point. There will be times when a great deal of public input is needed, and other times when agency staff will be occupied with technical tasks. Usually the agency responsibility is largest when the tasks at hand are most objective and technical, while the publics' role is preeminent when subjective evaluation is needed.

Once the roles of publics and agency for each stage have been established, you can begin to rough in suggested PI program objectives for each stage. Think of these in general terms, as objectives for what the program is expected to accomplish during each time-period. All of this may be revised, but you need to think it through first.

STUDYING METHODS AND TECHNIQUES

When you have a basic rationale you can get down to the nitty gritty part of planning specific activities related to the continuous exchange of information in day-to-day communications and the specific events which will be scheduled periodically throughout the project. The on-going communications dimension is a crucial aspect of the program and you must be careful not to let it be neglected in the bustle of preparing for events.

Although you will certainly make your share of mistakes, you can save yourself some grief and a lot of energy by turning to the books for information and insight. Read all the case studies you can find which relate to your situation, looking for the factors that made a difference in results. Study the advantages and disadvantages of techniques, methods and activities described. This is an area in which you should be in complete command of the details, understanding the uses, characteristics, costs and benefits so that prospective activities can be evaluated.

For each likely prospect you uncover, note the resources it will require, the benefits you can expect, and any special reasons why you think that it is a good method or technique. In your research you may also discover some overwhelming reasons not to use some methods which may seem attractive, and you should note these, too.

As you prepare your worksheets and read the case studies, you are developing your public involvement strategy. Based on the objectives for the PI program during each of the project planning phases, you are evaluating the various PI techniques available on the basis of their ability to obtain the desired results.

EVALUATING TECHNIQUES: AN EXAMPLE

During the Problem Identification phase of a water resources project, the objective of the PI program may be to identify public perceptions of the severity of surface water pollution. One way to do this would be to read letters received by the agency and the newspapers in response to an editorial in a local paper which called for action to clean up area streams. This would take the PI coordinator some time to count and analyze the responses, but it would not require a special survey of area residents. It may provide just as valid results as a mailed questionnaire.

Another option might be to establish a "hot line" and invite citizens to call in their concerns. This could get quick response and obtain publicity for the project and the PI program, but it could also result in bedlam if you aren't thoroughly prepared.

Yet another technique would be to conduct a series of informal "man-on-the street" interviews or a formal survey, using a scientifically drawn sample. This would take more time, and would require skill in interview techniques and survey and sampling design. On the other hand, it might yield more information from a larger and more representative group of people.

By weighing the potential advantages and limitations of many options, you can probably come up with one or two that seem better than the rest for your purposes.

PREPARING DISCUSSION MATERIALS

Your preparation has made you the Resident Expert; now you need to share what you've learned. Your purpose is to involve the staff in a genuinely shared program-development session, so don't present them with a final plan. However, you do need to prepare discussion materials for the agency meeting to focus the issues under consideration and help you arrive at consensus decisions. Many of the points we cover here will apply equally to public meetings and workshops. If the agency members are impressed by the way that you conduct the staff meeting they will be more likely to accept your suggestions for conducting "outside" meetings.

Begin by reviewing your updated worksheets describing agency and publics. Keep these realities in mind as you plan your presentation. Imagine how people will react and anticipate potential stumbling blocks.

Goal £1: Establish awareness of differing expectations of the project and the PI program

Discussion tool: **Comparisons Worksheet** you prepared earlier.
Transfer this information to a big flip chart which can be easily read by everyone in the room, and also prepare copies as handouts.

As you present to the agency the publics' expectations, you are initiating negotiations and acting as a link. You need to present such a realistic picture of those publics that agency staff will see them as genuine participants, who can, should, and in many cases almost certainly will influence project outcomes.

It is probably not a good idea to overtly present at this meeting the differing expectations which exist within the agency, but keep them in mind. Your aim is to promote cooperative rather than adversary positions both between the agency and the publics and among the various agency members. (After you leave the project you can apply for the position of Secretary of State or Ambassador to the UN).

Goal £2: Establish understanding and agreement on the PI program rationale.

Discussion tool: a big flip-chart version of the **Basic PI Program Planner** format. Write up a clear explanation for each part, and test out your presentation on someone outside the program.

This item will probably not take up a great deal of discussion time, but it should help to establish your credentials as a full-fledged member of the planning team and make those staff members who are unfamiliar with PI more comfortable with your proposals.

Goal £3: Staff involvement in developing program strategy

Discussion tool: lists of sample activities to be considered in achieving program functions. Be forearmed with notes on the characteristics of each, including estimates of costs in staff time and dollars.

After the relatively abstract ideas of expectation-comparisons and planning rationale have been introduced, they need to be applied to program specifics. Therefore, as soon as the first two items are sufficiently clear, you should move the discussion to the level of concrete examples. While the program design is ultimately your responsibility, you need to move people into discussion of specific activities to be sure that everyone really shares the same interpretation of what should happen and why. Also, collaborative thinking usually produces a better-quality end result and motivates people to work together to achieve it.

COLLABORATING AND NEGOTIATING

By this point you should be well-prepared for a meeting which will get the PI program off to a good start. If the chief administrator accepts your agenda, the remaining factor is the quality of discussion. As you anticipate this remember that you are not presenting a final program plan for approval. You want an exchange which moves toward accommodation, allows you and others to present useful information, incorporates staff ideas, and becomes specific.

EVERYTHING IS POLITICAL, AND DON'T YOU FORGET IT

If there is to be some kind of public involvement in the development of the final plans for the PI program, make sure that this is understood and acceptable. Identify which decisions about the PI program are negotiable and which are not. If final approval is required before plans are implemented, point out when and by whom approval is required.

If elections or other political events are likely to influence the PI program, try to determine before the meeting what kind of restraints or requirements might be imposed and when, and then plan to work within and, if necessary, around them. Try to avoid being placed in limbo until "after the election, after the reorganization, after the budget is approved, after....."

WHAT I REALLY MEANT WAS....

During the discussion, try to get everyone involved and make sure that what is said is clear to all. This includes making sure that you understand suggestions and/or objections raised by staff members and that you have answered all questions.

Before the meeting concludes, summarize PI program objectives expressed for each phase of the project to be sure that you have captured the meaning that was intended. Confirm that you have the go-ahead to create a program plan intended to achieve those objectives.

After the meeting, revise your planning sheets to incorporate whatever changes and additions developed during the meeting, and prepare to work on specific activities. Circulate dated copies of your Basic Plan (a neat and concise version of your revised planning sheets) to staff members.

The Discussion Process: A Scenario

You have gone over your **Comparisons** chart and the **Basic PI Program Planner** chart, answered questions and everybody is ready to get down to concrete activities.

YOU: "Now, let's see how some of this might actually work out in our study.

CHIEF ADMINISTRATOR: "Fine, I agree with the public that we should provide for full involvement."

YOU: "Do you have a mental picture of how that should be done?"

CHIEF: "Yes, we'll have an open public meeting next year to get their approval of the Plan."

YOU: (this is not the time for hysterics) "Did you read about the experience the staff had in the XYZ River Basin study when they waited until the plan was virtually complete to hold a public meeting?"

CHIEF: "I remember they had a few problems, but I didn't think they were serious."

YOU: "A couple of agricultural groups got very upset about some of the recommendations for future impoundments and held up approval of the plan for nearly a year. Joe M. from their group reported that late involvement which amounts to little more than after-the-fact review generates more antagonism than support."

CHIEF: (You've gotten his attention, now) "Well, what do you suggest? Resources are limited, you know."

YOU: (Slowly now, kid) "I wanted to get your ideas before setting anything in cement. But let's look at the chart showing which kinds of activities have seemed to be most useful at which stages of the planning process. Of course, choosing exactly what to do when depends on what it is you want to accomplish. For instance, what would you like to see happen at Stage 1? Of course, that's when the public will form its first impressions of the project..."

CHIEF: "I see. Well, let's have a big barbeque and invite the local politicos and representatives of other interest groups."

YOU: "The people I've talked with were very concerned about government spending, very conservative. We also need to be careful about inviting specific individuals and interest groups before we're sure who all has an interest. My contact list is growing every day."

AGENCY PLANNER: "Say, what about tying in with the local farm organizations to involve people? Maybe they might sponsor something."

YOU: "Great! That could reach about 60 percent of the population in this area, but not business and industry interests. If our goal is broad involvement...."

CHIEF: "True. Can you work up a plan for Stage 1 that includes everybody? With budget?"

YOU: (You've already got in your notebook cost figures for two dozen options) "Sure."

And so on.... If you can generate this kind of involvement and then crystalize it into a practical design which agency staff can support because they see its relation to their interests, gaining their aid in implementation will be relatively smooth.

STAGE 3: IMPLEMENTATION

Design Process

Detailed Preparation

Evaluation

The General Purpose: **Selecting, designing and developing specific techniques for carrying out the approved PI program.**

DESIGN PROCESS

Moving plans from paper to reality is a challenging process. In general, both the ongoing communications and event activities will require

refining your Basic Plan into detailed specifics,

designing systems that work well, and

evaluating your procedures to make sure that these systems are running smoothly according to design.

Now, How Do We Go About Doing These Wonderful Things?

First, refine your Basic Plan, setting as definite a sequential time-frame as possible. Work on both ongoing communications and event sections simultaneously as you think through the program so you can see how they affect each other. As you decide on specific activities and techniques, incorporate them into the Basic Plan. This enlarged version will then be your Master Plan.

At this time, allow yourself a little time for imagination as you consider possibilities for program activities. A few wild ideas might be tamed into extraordinarily effective techniques, but dull is going to stay dull.

After you've compiled a list of ideas, seriously assess the prospects. How likely is a given technique to achieve the stated purpose for the planning stage? What costs are involved, both for the public and the agency? Are the needed resources available? Is the technique appropriate for the people you expect to involve?

Would I Be Interested In This Program If I Weren't Getting Paid?

As you design your program, remember that you are to a considerable degree allocating time and energy belonging to other people -- both the public and your agency colleagues -- when they have priorities of their own.

Will they see the activities you have proposed as worth their time? If the answer is "no" or "dubious", start over. You cannot conduct a successful program without enthusiastic staff support, and without public involvement you don't have a program at all.

Look carefully at your ongoing communication activities. What access will be available, to which publics, at what times? What information will be disseminated when, to whom, and by what channels? Have you provided for continuity of available staff time to respond to inquiries and to maintain project visibility?

Review your Master Plan with agency staff and with any representatives of the public whose input would be helpful. Their reactions will help make the plan more feasible and effective.

DETAILED PREPARATION

For each activity that's been agreed upon, set up a Production Chart like the sample on the next page. Using graph or chart paper, list all the tasks that must be done. Then set up a dated time-frame along the other dimension of the sheet. For each task, plot the date by which it must be completed. Initial each item to show who's responsible for what jobs, and list all the resources -- time, money, materials, etc. -- that will be required. A detailed set of Production Charts gives you a fine planning and control device, and shows others how their work fits into the larger picture.

Did Anybody Answer That Phone?

You may have surmised that ongoing communication is very important. If you have not yet been able to get your telephone service and mail handling in order, do it now.

a) Identify in appropriate sequence each part of this total activity, from publicity methods to training telephone answerers and mail handlers.

b) Set up all the sub-systems and test them out; for example, after you have arranged for telephone services, ask a friend to call with an inquiry, perhaps at lunchtime. How hard was it to get the correct number? How was the call handled? What follow up was done?

c) Provide for periodic checkups to make sure the routine is working effectively. If there are problems, be sure you are diplomatic in your attempts to resolve them. Don't try to throw your weight around, especially if you don't have any to throw. If every secretary on your floor goes to lunch from noon till one, and none of their supervisors object, you may not be able to do a thing about it. Delay your own lunch, and answer the phone.

PROGRAM IMPLEMENTATION WORKSHEET: PRODUCTION CHART

ACTIVITY: _____

PURPOSE: _____

DATES _____

TASKS:						

(For each task, set due date and assign personnel)

Resources Needed: (List) _____

Ongoing Communications: Is Anybody Out There Listening?

Your ongoing communications activities will require a certain discipline to maintain consistency; you should build that in now. If, for instance, one of your methods were the sponsoring of PI program advisory meetings held in the project area communities, specify their frequency in a time-table, identify tasks like making arrangements for the meetings, list resources such as your time, travel money, and use of a car. If you don't pin down such activities, other demands are likely to supercede them. Typically, ongoing communications are rather low-profile, involving primarily your time and energy, dependent on your initiative and follow-through. Protect them by careful planning.

Events: Lights, Camera, Action!

The production of a public involvement event is similar to putting on a play, not because it's make-believe, but because so many details must be coordinated to make the event an experience with impact. For example you must:

choose the location of the event;

arrange for technical details like equipment, light and sound, comfortable seating, refreshments;

prepare visual aids;

rehearse the actors to make sure they know their roles;

direct the sequence and timing of the event itself;

handle publicity; and

host the event.

Rehearsals are a must, whatever you call them. Roles should be skillfully assigned to build on people's strengths. For example, some people can deliver a technical paper very well, but need a partner more adept with groups to field the question-and-answer sessions. An organization leader is not necessarily the right discussion leader; status can be recognized by formal functions such as welcoming the group or introducing staff while someone else acts as moderator for exchanges.

The Reason We Are Gathered Together Is....

If technical information must be presented at a PI event, keep it concise, and spend the time and effort necessary to prepare good visuals and a clear presentation. Some members of your staff will see the event primarily as an opportunity to educate the public and will want to give extensive lectures in engineering, economics, or microbiology in the course of a two-hour public meeting.

If they do this, the chances are good that the main results of the meeting will be to bore, confuse and perhaps alienate the public, particularly if the length of the presentations leave no time for them to ask questions and express their concerns. You may have to be firm in order to ensure that the agenda is designed to meet the goals of the event as you and the staff have agreed on them.

As you plan the event, remember that people need time to sort each other out before they can comfortably express opinions or otherwise "get down to work" on whatever is to be done. Allow get-acquainted time at the beginning of any event, providing name-tags, space, refreshments, and introductions to encourage conversation. Arrange for methods which identify people easily by interest groups. Finally, insist on scheduling "break times" at appropriate intervals. Often more real communication takes place during the breaks than during the meetings.

I Thought You Knew Where The Courthouse Was!

A few days before the event, draw up a script with directions in such detail as "5:30 p.m.--Jack moves in AV equipment and tests for light and sound." If you are depending on out-of-town hosts, try to ensure that they understand what you need. Most problems will have been solved during rehearsals, but circulate your final script in plenty of time to illuminate and eliminate any remaining problems before the event. Remember details like adapters for electrical cords, extension cords, and extra projector bulbs.

Scouting Out The Territory

Be sure to call local people in advance of the event, not only to encourage attendance, but also to find out what's on their minds. Relay their concerns to the planners, and then be sure that specific response is given at the event.

This advance scouting will also reduce the possibility of your being taken by surprise by 150 irate citizens who are looking for a forum for a strictly local issue which has little if any bearing on the project. They may still show up, but at least you won't be surprised.

"I'm Glad You Brought That Up" (even if you're not)

In preparing for the give-and-take nature of PI events your best opportunity of studying effective behavior may be to watch the masters of audience discussion shows on TV. Notice, for instance, Phil Donahue's skill at retaining the purpose of the program while encouraging a wide range of comments from people of all levels of education and apparent intelligence. The tools of their trade include setting a tone of friendly openness, introducing a subject as one on which more than one legitimate opinion is valid, and a kit-bag of useful comments such as, "I can understand why you feel that way," and "Let's hear what someone else thinks about that."

Be sure that you have someone recording the session and one or more people taking extensive notes of what is said and by whom, and names and addresses of people who have questions which must be followed up.

Expect The Unexpected--And Enjoy It

Because so many unknown factors are present in the situation your team must be prepared to be flexible. The new angles or unexpected concerns which may crop up can't be ignored or you will lose your audience. If your team can respond adaptively the rewards may include not only an enlightening exchange, but an increased respect for the agency.

Expect the unexpected in practical problems and natural disasters--blown fuses, speakers who get the flu, etc. Just provide all the back-up you can and don't worry.

During one memorable public meeting, a thunderstorm knocked out all the electricity. Startled, the staff member stopped his presentation in mid-sentence, but someone called out from the audience, "We can hear in the dark!" Since it was raining too hard for anyone to leave, the lively discussion of water problems continued in the pitch black auditorium until the storm was over.

Involving citizens in preparing and producing the PI event itself can be invaluable in ensuring that the agency's messages will be transmitted effectively. It is important, however, that their role be a real one, and that they take part in development of the program--cooptation or last-minute window-dressing attempts will not work for long and can irreversibly damage your program. Public members of the presentation team should be chosen for their skills and for their respect in the local community.

EVALUATION: WHAT'S IT ALL ABOUT AND WHY AM I HERE?

The question of the value of the PI program will come up again and again. The question arises frequently in the myriad of forms which are shuttled through various bureaucratic mazes. It also comes to you alone in the dark hours of the morning.

Progress Reports Without Pain

The bureaucratic-form type of evaluation is the simplest to deal with. Numbers are important here, so begin with the assumption that some sort of documentation, or record keeping, is necessary. You need to keep track of how many letters you receive, how many miles you travel, how many meetings you hold and how many people show up at them, how many inches of newspaper space you rate. For that matter, how many lawsuits are filed as a result of the PI program?

To decide just how to gather and maintain your program data, check out first what forms and official requirements exist. To whom will reports be submitted, for what purposes (this may not have a satisfactory answer), and at what intervals? Then set up your basic record-keeping to fit the report formats and your own purposes as well.

The process is similar to the preparation for filing income tax returns. People who set up their household records in relation to those items have an easy time filling in the blanks, while those of us who keep a scramble of mysterious slips in old shoeboxes live in a cumulative nightmare each year.

Feedback: What Do They Think?

Once you have a system, managing the bureaucratic paperwork should be relatively simple--unless they keep changing the forms on you. Don't neglect these niceties--your job and budget may depend on those numbers. However, dealing with the dark hours of the morning is more serious.

Systematic methods of getting feedback from colleagues and the public about ongoing communications and events in the PI program can provide useful subjective information about your overall effectiveness.

Some examples of forms used for feedback from the public are shown on the opposite page. Feedback form A might be a business reply card enclosed in a newsletter; form B might be a sheet of paper to be filled out and returned at the end of a workshop or other event.

The basic principles are

keep questions simple and to the point;

get responses while impressions are fresh; and

don't collect more than you can use.

Several kinds of feedback from colleagues are useful. One is the reaction they may have to PI events in which they have taken part. A debriefing session immediately after the event, possibly followed with a request for written suggestions can help to generate both ideas and commitment to the program. Try to be as open to their suggestions as you want them to be to yours!

Colleagues should also be encouraged to report to you any comments about the PI program--positive and negative--that they have picked up from their contacts with the public. If this is done routinely, the effect of any one comment is less likely to be magnified out of proportion to its importance, but patterns of comments can be picked up.

The feedback you get can tell you how the PI program is going. It can also help you to figure out why one technique is well-received, and why another seems not to accomplish its intended purpose.

Feedback Form A - Ongoing Communication

Feedback on Project Newsletter: Please respond to the questions below and then put this card in the mail. It needs no postage.

1. How thoroughly do you usually read the Project Newsletter? (Circle one.)

   NOT AT ALL
   VERY LITTLE
   SOMEWHAT
   VERY THOROUGHLY

2. What have you liked most about the newsletter?

3. What have you liked least?

4. Suggestions for improvement:

5. Do you wish to continue to receive the Project Newsletter? (Circle one.)

   YES
   NO Give your name and address so we may remove you from the mailing list.

Feedback Form B - Event

Please respond to the following questions. Place this form in the box by the door before you leave the meeting.

1. What is your overall rating of this meeting? (Circle one.)

   ++ + +- - --

   Comments:

2. What did you like most about the meeting?

3. What did you like least about it?

4. How would you rate the following small group sessions? (Circle the appropriate response after each.)

Session A	VERY GOOD	SATISFACTORY	NOT GOOD	DID NOT ATTEND
Session B	VERY GOOD	SATISFACTORY	NOT GOOD	DID NOT ATTEND
Session C	VERY GOOD	SATISFACTORY	NOT GOOD	DID NOT ATTEND

5. Suggestions for improving future meetings:

WHAT EFFECT HAS THE PUBLIC HAD ON THE PROJECT SO FAR?

This is the bottom line as far as you are concerned, so ask this question routinely so your colleagues will expect it. The answers should be illuminating not only to you but to the total planning staff and the public. It is often useful to zero in on the extent to which the intended effect was accomplished.

For example, in the EVALUATE ALTERNATIVES phase of a project the objective of PI might be to get ideas from the public about the relative importance of several criteria. Planners might be asked how the public had ranked the criteria, whether the rankings were valid, and what was the reason for the judgment of validity.

AND ALL THINGS CONSIDERED...

You may not be satisfied with the answers you get. The public input received may seem to be ignored or discounted by the planning staff. At worst the project itself may possibly turn out to be so ill conceived or poorly managed that public involvement seems useless. What then?

First, it is doubtful that any planning staff would totally reject public input, although it is quite possible that the impact of the public involvement on the project may be subtle. Just the knowledge that they have to explain their decisions will affect planners' actions even if they do not consciously respond.

At various times during the project period review your orientation worksheets and recall your initial impressions of your colleagues. If you sense any increase in openness or sensitivity to public concerns, score one for Public Involvement.

If the project itself turns out to be the major problem, consider that the existence of a public involvement program might minimize the damages and prevent a repetition of the disaster.

KEEP THE FAITH

No matter how great your enthusiasm and skill, you cannot eradicate public indifference in the course of a six-month, or two-year, or even ten year project. If you make a perceptible dent you're doing a fantastic job.

Sometimes, however, public awareness is slow to develop, and your efforts may bear fruit long after the project is over and you are gone to other things. Almost certainly a few people will have gained a better idea of how they can approach a government agency and how they can get a response to their questions and concerns. Another project or another public issue will come up, and when it does they will do better. And so will you.

POST-SCRIPT: NOTE TO THE PI COORDINATOR

Dear Coordinator:

Now that you have made your way through this manual, you can decide how much of it is useful to you in your situation, and what adaptations you will make in the worksheets. Regardless of your situation, you can count on the importance of the three stages described in this manual. You can be sure that you will have to do your homework concerning the project, the agency, and the publics.

Your biggest decision may be whether to take as much initiative as this booklet suggests, or to wait for directions from managers in the project or agency. The point of view expressed in this manual is that public involvement is sufficiently important and challenging that it deserves your initiative and the consideration of other staff. For you it is the primary concern; for other staff, it is but one of many responsibilities.

You have the opportunity, in your role as PI coordinator, to make creative contributions to the development of a working partnership between planners and the publics whom they serve. You also have the opportunity to share experiences with others who have similar responsibilities, thus adding to their, and your, store of knowledge.

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